

# **WELCOME**

**Introduction of Trainer**

**Introduction of Class Participants**

**Housekeeping Details**

**Agenda**



## **CAPS Training Agenda**

### **I. WELCOME**

- A. Introduction of Trainer and Guest Speakers
- B. Introduction of Class Participants
- C. Housekeeping Details
- D. Agenda

### **II. SYSTEM OVERVIEW**

- A. Security
- B. Accessing and exiting the system  
Explain training database/logon ID's  
Password Maintenance
- C. Keyboard Functionality
- D. Online Help Resources  
Help Desk
- E. Screen Functions  
Fast Path  
Messages  
Screen Headings  
List/Detail concept
- F. Menus

### **III. REPORT/REFERRAL**

- A. Searching for/Adding a Person
  - PERS Person Search
  - PERL Person List
  - PERD Person Detail
- B. Referral Intake Process
  - RRRL Report/Request List
  - CID1 Centralized Intake Detail 1
  - CID2 Centralized Intake Detail 2
  - RRD1 Report/Request Intake Detail 1
  - RRD2 Report/Request Intake Detail 2
  - RRD3 Report/Request Intake Detail 3

### **IV. CLIENT SETUP**

- A. Initial Setup/Transfers/Security
  - AXED Assignments/Transfers Detail
  - WMSG Warning Message
  - CSLL Caseload List
  - RELL Relationship List
  - RELD Relationship Detail



- B. Building Client History
  - ADDL Address List
  - ADDD Address Detail
  - CLID Client Detail
  - ICWD ICWA Detail
  - SPND Special Needs
  - EDHL Educational History List
  - MEDS Medical Summary
  - MMHD Medical/Mental Health Detail
  - MDTD Medication/Treatment Detail
  - EMPL Employment History

## **V. PROVIDER INFORMATION**

- A. Adding a Non-Licensed/Non-Contracted Provider
  - PROS Provider Search
  - PROL Provider List
  - PROE Provider Entry
  - PROD Provider Detail
  - FSPL Facility Services Provided List
  - PTID Provider Tax Identification Detail
- B. General Provider Details/Information
  - PADL Provider Address List
  - PADD Provider/Facility Address Detail
  - PAKD Provider AKA Detail
  - PIGD Provider Information (General) Detail

## **VI. PERMANENCY PLAN**

- A. Client/Case Assessments and Reviews
  - IARL Initial Assessment and Review List
  - IARD Initial Assessment and Review Detail
- B. Permanency Plan Hearing Information
  - PPHL Permanency Plan Hearing List
  - PPHD Permanency Plan Hearing Detail

## **VII. SERVICES**

- A. Non-Payable Services and Removals
  - SERL Services List
  - SERN Services Detail Non-Payable
  - CREI CPS Removal Eligibility Information
- B. Court Events and Dispositions
  - CRTL Court List
  - CRTD Court Detail



- C. Placements
  - CPHL Client Placement History List
  - PLAD Placement Detail
  - PLSH Placement Status History
  - LICH Placement License History
  - GARD Guardianship Detail
  - ADOD Adoption Detail
- D. Payable Services/Supplemental Justification
  - SERP Services Detail Payable
  - SSJD Supplemental Service Justification
- E. In Home Services
  - SEIH In Home Services
- F. Group Services
  - GRSL Group Services List
- G. Interstate Compacts
  - ICPL Interstate Compact List
  - ICPD Interstate Compact Detail
  - ICAD Interstate Compact Action Detail
- H. Montana Foster Care Independence Program
  - BSAS Building Skills Plan Summary
  - BSAE Building Skills Evaluation

## **VIII. MAINTENANCE SCREENS**

- A. Caseload Management and Client/Case History Screens
  - ALER Alerts
  - ACTL Activity List
  - ACTD Activity Detail
  - ACT2 Activity Detail 2
  - AKAD Person Name AKA Detail
  - STFL Staff List
  - EVEL Event List
  - SEAL See All Client Screens
  - USMD User Maintenance Detail
  - USML User Maintenance List
  - MIPD Minors in Possession Detail
  - SPTK Supervisory Task List
- B. Notes Process
  - Document Generation Process



## **IX. INTERFACE SCREENS**

- A. Interface Resolution Process
  - TIRD CHIMES Interface Resolution Detail
  - SIRD SEARCHS Interface Resolution Detail
  - SIR2 SEARCHS Interface Resolution Detail 2
  - APRD Absent Parent Resolution Detail
- B. Foster Care Child Support Enforcement Referral
  - SIID SEARCHS Initial Inquiry Detail
  - CSED Child Support Enforcement Referral Detail
  - CSCD Child Support Child in Foster Care Detail
  - CSFD Child Support Father Detail
  - CSF2 Child Support Father Detail 2
  - CSMD Child Support Mother Detail
  - CSM2 Child Support Mother Detail 2
  - PRID Private Insurance Detail
- C. TANF Emergency Assistance Application
  - TIID TANF Initial Inquiry Detail
  - EARD Emergency Assistance Request Detail
  - EAR2 Emergency Assistance Request Detail 2
  - EAWD Emergency Assistance Services To Be Provided

## **X. PAYMENTS**

- A. Approvals/Modifications/History
  - PAYA Payment Approval List
  - CBPL Client-Based Payment List
  - CBPD Client-Based Payment Detail
  - PAFD Payment Funding Detail
  - CLPH Client Payment History
  - CMPL Client Monthly Payment List
  - CLPD Client Payment Detail
- B. Funding Eligibility
  - CELL Client Eligibility List
  - IVEL IV-E Reimbursability List
  - IVED IV-E Reimbursability Detail
  - IVRH IV-E Reason Code History
  - MIHL Medicaid Issuance History List
- C. Provider Warrants (Checks)
  - WRNH Provider Warrant History
  - WRND Provider Warrant Detail
- D. Contracts
  - CONL Contract List



COND        Contract Detail  
CONC        Contract Costs

- E.    Overpayments
  - OPAR        Overpayment Recovery
  - ORAD        Overpayment Recovery Activity Detail

## **XI.    TRUST ACCOUNTS**

- A.    Requesting an Expenditure
  - TREL        Trust Account Expenditure List
  - TRED        Trust Account Expenditure Detail
  
- B.    Viewing Client Trust Account History
  - TAHL        Trust Account History List
  - TAHD        Trust Account History Detail